# THE FUTURE OF NORTH AMERICAN MARKET INTEGRATION: THE MEXICAN PERSPECTIVE

By

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**(PRELIMINARY DRAFT: NOT TO BE QUOTED WITHOUT THE AUTHORS' PERMISSION)**

Trade in agriculture has become a thorny issue for multilateral negotiations. After 10 years of NAFTA, there have been some studies, as well as outcomes regarding the impacts of freer trade in agribusiness. While an analysis of such effects shows that some of the benefits and implications have materialized, others are still pending. In the new context of globalization of the food system and the emergence of new players in the world arena, such as China, India, Argentina and Brazil, a new vision for NAFTA is needed. This paper argues that in order to reap the benefit of freer trade under NAFTA, the tri-lateral relationship has to move to a next step in the quest for integrating NAFTA trading blocks, NAFTA agribusiness companies and NAFTA brands that would help achieve a *Pareto-optimum* stage for Canada, Mexico and the United States. To that effect, a more coordinated approach for national policies is needed, as well as an effort for NAFTA institution-building and strengthening.

## Introduction

The North American Free Trade Agreement (NAFTA) between Canada, Mexico and the United Stated became effective January 1994. Under the Agreement, some agricultural commodities and products were fully liberalized from the onset, while others were subject to a process of a year to year liberalization schedule. Thus, full free trade in agriculture was expected to be reached on January 2003 for some products and 2008 for the rest. [2] As for the latter group of commodities, tariff rate quotas (TRQs) and/or seasonal tariffs were used. Mexico imposed TRQs for the imports of barley, beans, maize and powdered milk, whereas the U.S. included seasonal tariffs as well as TRQs for several fresh vegetables and fruits imported from Mexico (Yunez and Barceinas, 2003).

## I. NAFTA in agriculture: expectations and facts

Structural changes arising from NATFA implementation were expected. Following Calva (1995), Levy and van Wijnbengen (1992), those implications can be summarized as follows.

First, an increase in productivity and production structure was expected. The agricultural supply of Mexico would be restructured and production would experience efficiency gains. The increase in competition across the NAFTA countries would force the domestic producers of importable goods to compete, increasing the productivity and/or diminishing the domestic supply of these crops.

Secondly, the shutdown of non-competitive agricultural activities would cause internal migration from rural urban areas or borders cities, increasing the international migration to the U.S. as well.

Finally, it was expected that the "law of one price" for traded agricultural goods would rule. That means that domestic prices of Mexican agricultural products would closely follow international prices. Also, the prices of

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[2] For a complete schedule for trade liberalization please refer to second part of North America Free Trade Agreement; "Goods Trade", section B: Tariffs. Article 302: Tariff elimination. Annex 302.2 section B: Tariff elimination for Mexico.

imported crops by Mexico such as beans, corn, sorghum, wheat and oilseeds would decrease. Trade between the U.S. and Mexico was expected to increase following a competitiveness criteria. Therefore, Mexico would export to the U.S. vegetables and fruits while U.S. would export to Mexico grains.

A careful assessment of NAFTA effects shows that the expected changes actually materialized, but not at an even pace across the industry.

**Prices of major traded crops.** Yunez and Barceinas (2003) have econometric evidence that there is a long run trend for Mexican prices of importable goods to follow their international counterparts before and after NAFTA. However, contrary to what was expected, they found that under NAFTA domestic prices of barley, maize, sorghum and wheat have not showed a tendency of a higher convergence with international prices. In contrast, their research shows that for the same period, the prices in Mexico of some of the most important exported vegetables and fruits have become more linked to international prices. (Serra, 2005; Yunez, 2005).

**Agricultural trade.** As anticipated, overall agricultural trade has grown. This has been also the case for each of the major exported and imported crops. Econometric studies developed by J. Edward Taylor *et al* (2004)[3] split the sample into two sub-periods –before and after NAFTA- to assess whether a `break point´ or structural change of Mexican exports to U.S. could be attributed to NAFTA. The authors´ findings show that such `break point´ was present for the case of Mexican exports of vegetables and fruits after the implementation of NAFTA.

**Rural employment and migration.** Total employment in the primary sector (agriculture and mining) dropped by almost 2%, which reflects the decrease in agriculture employment in Mexico. As predicted, rural migration from Mexico to the U.S. has increased.

**Structure of production and productivity.** As predicted, domestic production, cultivated areas and yields of the most important exported vegetables and fruits have increased. This is not the case for importable goods since; the aggregate domestic supply of the six major imported crops has not collapsed (this trend is basically explained by the evolution of the supply of maize and, to a lesser degree of sorghum) (Yunez, 2004). As expected, the yields of basic crops have increased during NAFTA, but this has only occurred to those crops obtained under irrigated conditions. It is important to add that, there has been some tendency in the agricultural sector to substitute exportable for importable goods, but the composition of agricultural supply of Mexico has not radically changed (Rosenzweig, A. 2000, Rosenzweig, A. 2004).

Concurrent with the trends in yields, labor productivity in crop production—measured as value added divided by employment—increased continuously from the late 1980s to 2001. Agricultural real wages have experienced a different situation, by decreasing during the period 1980-1997 (especially during the macroeconomic crisis of 1995 -96) and increasing slightly from 1997 to 2001 (Puyana and Romero, 2004). The production of maize has not collapsed during NAFTA, due to several factors. First of all, the price increase of basic commodities during 1995-1996, coupled with the Mexican peso devaluation deriving from the tequila crisis of 1995, increased prices expressed in local currency; and in fact, during the period 1995-1996 the prices of Mexican commodities reached historical peaks. Secondly, the Mexican policies regarding subsidies guaranteed the income of farmers who were planting maize. Finally, and probably the most important factor, there are cultural and economic factors among the low income Mexican rural population, since they believe that having their own harvest and being self-sufficient, creates a safety net for them and their families.

The next section focuses on some of the current trends associated to NAFTA, aiming to identify several barriers to integration. Additionally, it includes the discussion regarding the need of a new vision that will allow for the overcoming of today's integration obstacles.

[3] Appling the classical test of structural change that is typically attributed to Chow (1960).

## II. Agriculture markets integration: trends and vision

The recent economic environment presents three significant challenges for the future:

**Uneven agricultural integration.** Relevant impacts in the inter-regional trade have been observed under NAFTA. The Mexican agriculture markets have experienced an integration process in two different kinds of industries: the subsistence farming and the commercial production industry. The subsistence agricultural sector is characterized mainly by family enterprises, which usually have other sources of income. For these family enterprises, the integration process has been delayed compared to other agricultural businesses. For the commercial agricultural industry, the integration process has been associated to market concentration depending on the industry's degree of competitiveness. For example, the Mexican dairy industry has gone through a process of mergers and acquisitions that have created a new dominant player in the Mexican milk market: a local firm, Lala, as of today has a 70% market share of the fresh and UHT market. Another example can be found in the Mexican poultry industry where 52% of the market is dominated by three firms: Bachoco (31%), Pilgrims Pride (11%), and Tyson (10%). Similarly, in the case of the processed pork industry, 70% of the market is concentrated between two firms: Sigma (40%) and Qualtia (30%). Qualtia was created by the merger of two firms: Kir and Axa Alimentos.

**Competition from China and the European Union.** Competition from China and EU has displaced former Mexican and Canadian exports to the U.S. market. The loss of U.S. market share has caused employment and foreign direct investment reductions in these countries.

**Globalization of agribusiness**. New players such as Argentina and Brazil, as well as the trend regarding the globalization of the supply chain by large agribusiness companies, have resulted not only in higher competition, but have also transformed the focus on competitiveness from a single commodity to value added products.

**Stagnation in the NAFTA agricultural trading**. The lower dynamism of the commercial agricultural exchange can be partially explained by institutional differences and the lack of common policies and laws among the NAFTA members.

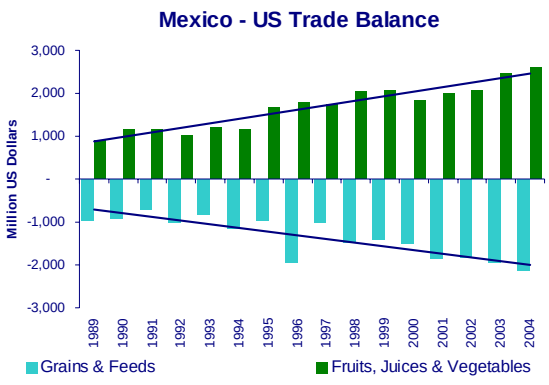
The common world trend is commercial and economic integration towards the increase of competitiveness and the more efficient use of scarce natural resources. The new NAFTA vision must consider this trend and leverage each countries strengths to reach a *superior Pareto-optimum.*

### A New NAFTA Integration Vision in Agriculture

### Current trends and perspectives for integration

The growth of agricultural trade in North America during NAFTA can be considered an indicator of increased market integration. It also shows that other factors such as multilateral trade negotiations have helped to stimulate North American integration. As it was expected, the markets of U.S. grains and Mexican fruits and vegetables increased their trade growth rate after the implementation of NAFTA.

**Figure 1**




Source: Department of Commerce, US Census Bureau, Foreign Trade Statistics

A higher degree of integration could help to improve regional competitiveness in North-America. For example, it is clear that the U.S. has advantages producing grains and Mexico has advantages producing fruits and vegetables. In this sense, if the U.S. and Mexico could coordinate and focus their agricultural production within a scheme of market integration, then both countries could reach a *superior Pareto-optimum.*

The increasing benefits for all NAFTA countries could stop because of the lack of

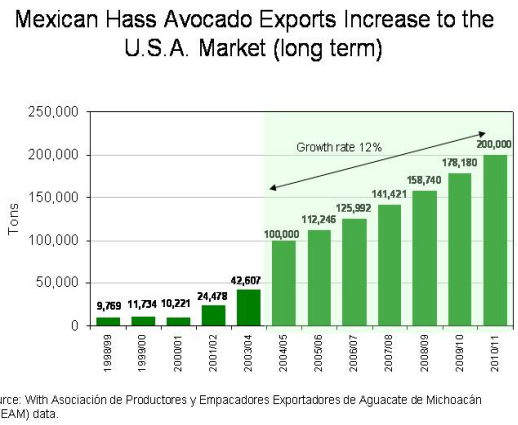
appropriate policies. It would be desirable to integrate the U.S. and Mexican markets of grains, fruits, juices and vegetables in order to increase their competitiveness. For example, the avocado trade was constrained by non-tariff barriers. The elimination of these non-tariff barriers in the U.S. is expected to create new opportunities for Mexican exports, increasing not just trade but also market integration, ultimately benefiting consumers. The avocado long term business presents bullish perspectives.

The APHIS (Animal and Plant Health Inspection Service) of the USDA, has published the final rule for the Mexican Avocado Import Program. This final rule determines that Mexican avocado from approved orchards in certified municipalities in Michoacan, Mexico can be distributed year-round across all states in the US except for California, Florida and Hawaii. Two years after this rule became effective (January 31st, 2005), Mexican avocado may be distributed nationwide in the US. Mexico needs to take advantage of this scenario: specialization is needed in all of the stages of this industry in order to reach the highest benefits from this final rule. Michoacan, Mexico's main avocado producing zone has an output of about 1 million tons in a surface of 100,000 hectares (247,100 acres). The certified export surface will increase to 35,000 hectares (86,485 acres) from the actual 27,500 hectares. The expected production presents a 12% increase in 7 years from now; and is estimated to total 1.15 million tons. This figure can be surpassed with adequate technology for yield improvement.

**Box 1. The Mexican avocado non-tariffs constraints**

Mexican avocado exports are expected to be 300,000 tons in the long term; two thirds of them will go to the U.S. market and the other one third to European and Asian countries. The 200,000 tons represent about 60% of U.S. domestic consumption. Currently, authorized orchards contribute 2 tons of avocados per hectare for foreign markets; the new perspective is to increase this volume to up to 4 tons per hectare. In terms of competitiveness, Mexico can keep its leadership versus Chile (main competitor) and U.S., specifically California (top producer in the country). California will significantly decrease its output due to their high production costs. On the other hand, farming surface reductions are expected because of urban growth. Chile has higher production costs than Mexico. The long distance to the American market implies high freight rates that further increase their costs. Chile may loose the U.S. market share as a result of the Mexican avocado new import rule.

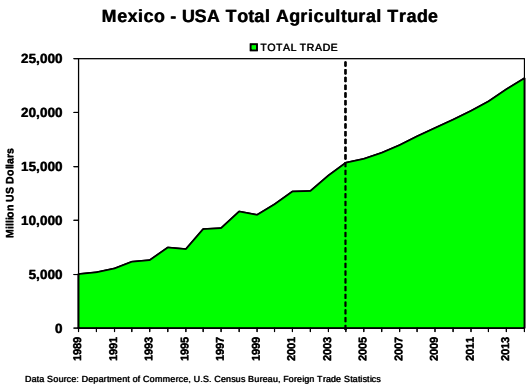
**Figure 2**




Source: With Asociación de Productores y Empacadores Exportadores de Aguacate de Michoacán (APEAM) data.

The annual growth rate of the U.S. agricultural exports to Mexico was 5.8 % before NAFTA (89-93). Nowadays they grow at a rate of 7 %. On the other hand, Mexican agricultural exports to the U.S. were growing at a rate of 3.5 % before NAFTA, currently they grow at 5.8 %.

**Figure 3**




Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

During the next 10 years it is quite possible that the trade growth rate between Mexico and U.S. will reach a plateau. The integration process among the NAFTA members has to advance towards a next step in order to maintain the current growth rate. The impact in agricultural trade would diminish if NAFTA countries do nothing to achieve a higher degree of integration. If the actual trade growth rate between Mexico and U.S. continues it could be possible to almost double the total amount of trade during the next 10 years (Figure 3).

**New Integration Vision**

The big challenge for the NAFTA region is to become a fully integrated area, aiming to increase the regional productivity and to reach a *superior Pareto-optimum.* The process of regional integration must lead to the creation of a North American commercial block to compete *vis-à-vis* other commercial regions. The North-American market integration must consider the particular members´ features and comparative advantages.

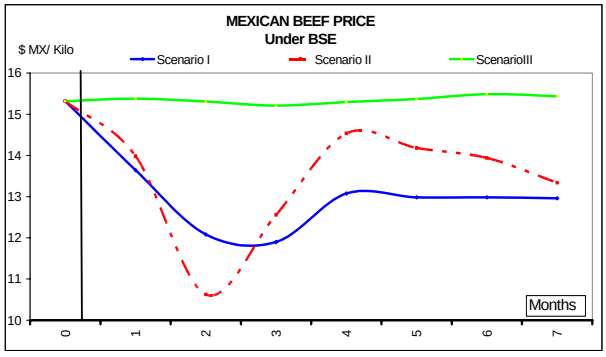
An example of integration in the NAFTA region is given by the beef industry. In 2002, 90% of the Canadian beef exports and almost all Canadian cattle exports went to the U.S. (Boeme et al, 2004). Additionally, the U.S. cattle and beef exports to Canada have grown under NAFTA. As a result, these industries in the U.S. and Canada have been reoriented along their north-south lines. Mexico is an important part of this continental market; it is the second largest market for U.S. beef exports. A large volume of two-way trade among the NAFTA countries now characterizes the cattle and beef industry of North America. The cattle and beef market integration is increasing following competitiveness considerations. In 2004 Mexico was a good supplier of feeder cattle to the U.S. The two markets have shown compatibility.

The NAFTA countries could work together to fight common risks such as animal and plant diseases that can disrupt industries and markets within and outside the trade region. The impact of Bovine spongiform encephalopathy (BSE) is an extreme example of a common risk. Greater cooperation among the NAFTA partners may prevent future border closures in response to new safety concerns. Nevertheless, BSE is only one of the potential common biological risks. There are others such as: avian influenza, microbial contamination, and bio-terrorism.

**Box 2. The impact of bovine spongiform encephalopathy (BSE) on the cattle and beef industry**

With the discovery of BSE in Canadian livestock in 2003, the U.S. closed its border to Canadian cattle and beef, as well as Mexico and most other foreign markets. If a BSE case is detected in Mexico, the first scenario would be comparable to the U.S. price instability[4]; it means a 10.9% beef price decrease during the first month, followed by an additional decrease of 11% the next month. The U.S. beef price began to increase four months later. An alternative scenario would be similar to Canada[5], a decrease of 9% the first month, followed by an additional decrease of 11% the next month. Canada's beef price began to increase during the fourth month as well. Both alternatives imply firm losses mainly in exports.

**Figure 4**




**Scenario I.** Price variation of Mexican beef follows the U.S. pattern under BSE detection, and international prices remain constant.
**Scenario II.** Price variation in Mexico follows Canada's pattern.
**Scenario III.** Mexican beef price variation without BSE presence.

Another example of integration within the NAFTA region is the poultry industry. The Mexican poultry industry has experienced several problems regarding its integration to the international markets, mainly because of the required sanitary standards. Therefore, Mexican exports are not significant. Although, Mexico

[4] Beef Prices in Nebraska. Source: USDA.
[5] Beef Prices in Ontario. Source: USDA.

has climatic advantages that have still not been exploited. In 2002, a closer relationship started to develop among poultry companies when the Mexican National Union of Poultry producers started an official relationship with their counterparts through the creation of a NAFTA Egg & Poultry Partnership (NEPP). The NAFTA firms' role is the most important element for competitiveness in the poultry industry. NAFTA firms can regulate the markets selling breast and wings in the U.S. and leg quarters to Mexico taking advantage of the market preferences within the NAFTA countries. The comparative advantages of the U.S. are: large grains production, scientific advances in genetics and technology; and additionally, the U.S. is the largest poultry exporter. On the other hand, the comparative advantages of Mexico are: favorable weather conditions and a relatively cheap labor force; additionally, Mexico is one of the top four poultry producers in the world. The comparative advantages of both the U.S. and Mexico can follow a complementary scheme. The challenge for NAFTA poultry is the expansion of a sanitary border belt and the creation of a functional regional sanitary regulation across the U.S. and Mexico.

**Box 3. NAFTA Egg & Poultry Partnership (NEPP)**

NEPP objectives are: i) to be a mechanism to discuss and analyze common problems; ii) to create a forum for mutual understanding and cooperation; iii) to create task groups to discuss and solve issues on consumption, trade barriers, sanitary policies and trade disputes. The poultry industry experience concludes that there are complementary markets within the NAFTA countries. For example, the U.S. prefers chicken breasts and wings while Mexico consumes the chicken leg quarters. Mexico imports feed grains and oilseeds. Mexico offers to the U.S. labor force and appropriate weather conditions for production. (Cesar de Anda, 2004).

Additionally, the new competitive strategy is to compete in block as a "NAFTA industry" and as "NAFTA products". Some companies have already become "NAFTA firms" sharing operations across the three countries (Doan, *et al*, 2004):

- In North America, McCain Foods operates eleven processing facilities in Canada, eight in the United States, and one in Mexico. The integration effort of McCain Foods has evolved from a small producer of frozen French fries to Canada's largest processed food company.

- In Mexico, Gruma has emerged as the world's largest producer of corn flour and tortillas, as well as the largest U.S. producer, due in part to a joint venture with Archer Daniels Midland (ADM). For the past few years, Gruma's U.S. operations have accounted for about half of its total corporate sales. Also, Mexico's BIMBO, which is the largest bread manufacturing company in Mexico, has purchased several bread-baking companies in Western United States. Nowadays, BIMBO is the third largest baker in the world, with roughly a 5 percent share of the U.S. market for bakery products.

Presently, capital flows within the NAFTA region are looking for new markets or increases in their market shares. Canadian and U.S. firms are investing in Mexico searching for economic benefits. While, Mexican firms such as Gruma are targeting the U.S. Latin American consumers and BIMBO and FEMSA (Fomento Económico Mexicano S.A.) are targeting the American market as a whole.

All NAFTA countries have been losing jobs against China. They need to work on a new competitive strategy, a new strategic alliance, and their firms need to work as NAFTA corporations to regain competitiveness and market shares throughout the world. NAFTA could be used as a framework to make it easier for companies to have their financial operations in one member country, its research and development in a second country, and its manufacturing in a third country, depending on which country can be considered the most advantageous for each need. The new vision consists of transforming North America into a region of cooperation and integration.

In order to accelerate the creation of NAFTA firms it is necessary to design public policies that could support this objective.

**NAFTA agricultural public policies**

Currently, agricultural trade is strongly dependent on international market dynamics. These dynamics produce common international prices for specific commodities (USDA, 2002). In the past, national farm bills (subsidies) were effective to improve agricultural production and competitiveness. Nevertheless, in a context of more integrated markets and higher dependency on international prices, it could be relevant to revise whether the use of these instruments is the most effective tool to compete in the long term without affecting the economy and social welfare of countries.

**Box 4. World Trade Organization controversies**

Between December 2000 and May 2002, the world price of cotton declined by 40%. In April 2004, a World Trade Organization (WTO) dispute panel declared the majority of U.S. cotton programs inconsistent with the commitments that the U.S. agreed to fulfill during the Uruguay Round. The panel reached this decision since the U.S. farm bills affected both international cotton prices and production (Goldberg, Lawrence & Milligan, 2004). The most important issue is that these negative effects upon international cotton markets affect not only other world cotton producers, but also the U.S. cotton producers because of i) the loss of productivity; ii) the fall on international cotton prices, and iii) the changes on both worldwide cotton supply and demand (Krugman, 2001).

Currently, several countries are not only looking for access to preferential markets throughout their inclusion in free trade agreements, but also, they are integrating strategic blocks and developing common agricultural schemes of support in order to i) benefit from particular comparative advantages; ii) improve economic and social welfare; iii) secure a common consumption market, and iv) compete more efficiently in global markets. One example of this is the development of common agricultural policies in the European Union.
A NAFTA block could compete more efficiently and competitively in global agricultural markets than each country by itself; since together they have different capabilities and they can produce different agricultural products which can obtain better relative prices and that can be traded, not only within the block, but also with countries with which the NAFTA members share additional free trade agreements. In this sense, Mexico's trade agreements could work as a gateway to compete in other blocks. Mexico is one of the countries with the largest number of free trade agreements signed in the world.

Additionally, in order to increase the agricultural competitiveness of the NAFTA region, it would be necessary to develop common agricultural development policies and programs to diminish productive asymmetries among the U.S., Canada and Mexico and to produce strategic products for both the NAFTA region and overseas markets without affecting international agricultural trade.

Finally, there are several barriers to achieve the new vision for the NAFTA region. All these obstacles can only be overcome with common solutions and demand cooperation among the NAFTA members.

## III. Integration process and NAFTA: barriers and challenges

**North American Security Agreement.** The requirements of border security have become an obstacle for free trade since September 11. A North American Security Agreement could fix this kind of protectionist requirements. An agreement of such nature would help Mexico to increase its exports and to attract additional foreign direct investment (Serra, 2005).

**Macroeconomic convergence.** Due to the macroeconomic convergence between the three North American countries, the coordination of macroeconomic policies among the members of NAFTA would be desirable. Such coordination could improve the macroeconomic stability of the region by reducing the risk associated with the economic activity.

**Strengthening of NAFTA institutions.** During the last 10 years, the experience has shown that dispute resolution requires a system that could lead to compulsory and enforceable resolutions. A common effort could be made in order to strengthen those NAFTA institutions that presently cannot offer enough certainty in

the implementation of regional economic operational rules. If clear rules are enforced and followed by NAFTA members there would be increased certainty and security for commerce and investment, which would increase trade and investment within the region.

**Complementary schemes in agriculture.** There is a potential complementary linkage in agriculture that the NAFTA countries could implement. For example, Mexico has a comparative advantage producing in sectors that require high labor intensity, rather than a high intensity on land, i.e. fruits and vegetables. In contrast, the comparative advantage of our regional commercial partners is focused on products that require vast land extensions and high capital intensity. Therefore, the particular comparative advantages of the NAFTA members could be used and combined to coordinate a regional commercial block that could compete with other economic regions.

**Transport and logistics.** In order to take advantage of the NAFTA dynamics and international trade benefits associated to lower exchange costs within the NAFTA region, it is necessary to i) match transporting costs among countries, mainly between the U.S. and Mexico; ii) promote international firm alliances, and iii) develop both train and maritime transportation systems.

**Branding.** The challenge is to take advantage of NAFTA to create a competitive platform to develop a common Canadian, Mexican and U.S. product branding to compete in global markets. One core element that should be considered is the creation of cooperation mechanisms that could develop a positioning strategy for NAFTA brands and that could certify product features in order to guarantee quality standards. Additionally, such mechanism should identify joint business initiatives among NAFTA countries that could promote the development of competitive synergies.

**Regional technology and innovation development.** A strategic element to consider in the integration process of a NAFTA block is the development of a "NAFTA agricultural innovation system" to stimulate investments in core agricultural issues like R&D activities and technology development in order to increase the agricultural competitiveness, safety and environmental sustainability of the block. This regional innovation system would not only positively affect R&D activities, but also it would promote technology transfers and the creation of common agricultural quality standards. Additionally, a regional innovation system would maximize the benefits of both a free trade area and a more integrated region.

## IV. Conclusions and Recommendations

The integration process of NAFTA implies full cooperation between the Canada-U.S.-Mexico triad. Additional clear rules must be developed, such as a security agreement. Trade can be used as the engine to increase economic integration and macroeconomic convergence among the NAFTA members. Economic resources are needed to strengthen NAFTA institutions, which are required to increase certainty and security for commerce and investment within the region. Searching for complementary schemes in agriculture is the basis for achieving a regional competitiveness that would allow the NAFTA block to compete with other economic regions. Key factors for achieving regional North American competitiveness are the creation of transportation & logistics schemes, expansion of a sanitary border belt, functional regional sanitary regulation across the block and common branding plans.

NAFTA firms play a crucial role in increasing competitiveness for the block. NAFTA firms can produce and trade products to compete in global markets by focusing on the competitive advantages of its own country. While the U.S. and Canada have developed capabilities in agricultural technology, Mexico has beneficial weather conditions, labor force and international free trade agreements that make it an attractive international trade gate. It is important to diminish asymmetries among the U.S., Canada and Mexico to produce strategic products for both the NAFTA region and overseas markets.

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